

INTERNET TRAVEL CONVERSION STUDY

Final Report of Findings

our study # 6-504

September, 1997

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For:
Travel Montana
and
Wendt Advertising

our study # 6-504

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NOTES TO THE READER

REVIEW THE QUESTIONNAIRE

A copy of the questionnaire is included in the Appendices. Readers are encouraged to review it before reading this report. The question numbers have been included in the graphs for easy reference to the questionnaire, but to improve readability, the graphs include paraphrased, more readable versions of the questions and answer categories.

UNDERSTAND THE STATISTICAL INDICATORS

Statistical tests (t-tests, F-tests, and ANOVAs) were performed on the data to uncover findings related to group differences and trends. Statistical indicators called *p*-values are used in the text of this report to indicate the statistical significance of these findings. The smaller the *p*-value, the more statistically significant the test result. The *p*-value measures the reliability of the result, estimating the probability that the outcome has occurred by random error or chance.

A *p*-value of .05 or smaller is considered statistically significant, with smaller values connoting more reliable effects. If the text indicates that a finding is significant, but does not report a particular *p*-value, that means that the finding is significant at the $p < .05$ level.

Occasionally, analyses will be conducted to determine the difference between groups of variables. In this case, a number of *p*-values will be indicated and denoted as *ps*.

HIGH VALUES REFLECT MORE POSITIVE RESPONSES

The interview contained a mixture of response scales. For some, the lowest value (e.g., 1) represents the most positive response (e.g., “yes”), and for others the highest value (e.g., 5) represents the most positive response (“extremely important” or “extremely satisfied”). To enhance interpretation ease, **all** responses are recoded after data collection so that the highest scale value represents the most positive response. This “reflection” process does not alter the data but makes interpretation more consistent with the verbal description of the findings.

PAY ATTENTION TO THE *N*

When evaluating the results, take into consideration the total number of respondents who answered the question. The percentages and means derived from small sub-samples are less stable than from larger samples or *N*. Nonetheless, statistical tests take into account the *N* strongly; therefore, a significant finding of $p < .05$ is as reliable for a small sub-sample as for a large *N*.

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EXECUTIVE SUMMARY

The purpose of this study is to assess the overall effectiveness and efficiency of the Travel Montana Web site in its ability to convert potential travelers to actual visitors. Potential travelers were defined as those who registered in the guest-book of the Travel Montana Web site. Because potential travelers used the Internet for their inquiries, the survey was also conducted on the Internet.

MAJOR FINDINGS

The Internet is a viable tool in a travel promotion campaign. The conversion rate is very good (over 50%), and the time and money spent per visit is similar to that found in the PI/TV Travel Conversion study. These travelers are desirable – ones that any state would seek out.

Most Web visitors and Montana travelers are in the Active Outdoors segment. The majority of converted travelers in this study fit the Active Outdoors psychographic. Also, this group had the highest conversion rate.

RECOMMENDATIONS

Promotion of what the Web site offers is key. Since the Web site seems to be an attractive alternative to those potential travelers who are comfortable with Internet technology, promotion of the site is essential.

Immediacy is another key. In addition, if the site offers up-to-date information for those who obtain the bulk of their travel information “the old-fashioned way” (by mail brochure), it can reinforce or even extend existing travel plans. The Internet’s ability to provide up-to-date information immediately when the traveler wants it (versus waiting for a brochure in the mail) can be seen as an attractive feature of the Web site.

Reinforce promotional themes on the Web site. Another potential benefit of the Web site can be its ability to focus on specific promotional themes for reinforcement of special travel events. The upcoming Lewis & Clark celebration could be just such an event.

PROFILE OF THE “TYPICAL” MONTANA INTERNET VACATIONER

Based on survey data, a profile of the “typical” Montana visitor who visited the Travel Montana Web site would show:

- ◆ The majority who registered in the Travel Montana guest-book were travelers, as almost all (95%) said they took a vacation in the past year.
- ◆ They made their decision to travel to Montana **before** getting on the Web site and ordering travel information.
- ◆ The information on the Web site and any additional information they received helped to reinforce their decision to travel to Montana, and in some cases respondents said the information resulted in a longer visit.
- ◆ Almost two-thirds fit the Active Outdoor psychographic profile.
- ◆ The majority say that Montana was their **primary** destination.
- ◆ There are usually two adults in the traveling party, 40 years of age or older, with substantial income.
- ◆ If they have children living at home they include them in the traveling party; if there are no kids at home, two adults make up the traveling party.
- ◆ Summer visits were most likely.
- ◆ The average stay included six overnights, usually in a motel or hotel, with campgrounds the second choice.
- ◆ The average amount spent per day (excluding travel costs) was about \$145; the average amount spent per trip was almost \$840 per traveling party.
- ◆ Those who had made previous trips to Montana in the past five years were more likely to have visited Montana this past year than those who had never been to Montana.
- ◆ Most travelers were very satisfied with their most recent visit – no respondent was dissatisfied – and they are very likely to return, probably in the next two years.
- ◆ Both travelers and non-travelers showed an interest in a future trip that followed the Lewis & Clark Trail.

INTRODUCTION

Travel Montana and Wendt Advertising wish to improve the performance of advertising for Montana tourism. Along with conventional media advertising in magazines and television, Travel Montana has established a home page on the Internet to provide information and entice potential visitors to Montana.

This fall, Clearwater Research performed a study that measured the effectiveness of a new type of television advertising – Per-Inquiry advertising. The Internet Travel Conversion Study also measured the effectiveness of a relatively new type of outreach program – the Travel Montana Web site (www.travel.mt.gov).

STUDY PURPOSE

The purpose of this study is to assess the overall effectiveness and efficiency of the Travel Montana Web site in its ability to convert potential travelers to actual visitors. Potential travelers were defined as those who registered in the guest-book at Web site. Because potential travelers used the Internet for their inquiries, the survey was also conducted on the Internet, rather than using the conventional phone interviewing methodology as employed for the PI/TV Travel Conversion Study. We also examined the demographic and psychographic profiles of travelers and non-travelers, and compared the results to the PI/TV Travel Conversion Study.

SURVEY METHOD

The methodology involved telephone recruiting and Internet interaction.

- We located the actual user/registrant (the individual who completed the guest-book information) by phone.
- We ascertained that this individual was in fact responsible for travel planning for themselves or their family.
- The recruit was invited to complete a survey at Clearwater Research's Web site (www.clearwater-research.com).
- If they accepted, they were given a special password for the site, and a personal respondent number for identification.
- At the site, the respondent entered their password to access the survey, and their respondent number to begin the survey.
- A personal question (age) was asked at the time of the recruit, and was re-asked on the Internet survey. This was to ascertain that the recruited individual was in fact the survey taker (and not someone else).
- Internet answers were compared to the original answers from the phone recruit – any that did not match were disqualified.

Because we expected some drop-outs using this method (non-qualifiers and respondents who, though invited, never completed the survey), we over-recruited to insure that a large-enough respondent base was obtained.

THE SURVEY INSTRUMENT

The questionnaire used in this study was designed by Clearwater Research, Inc., in cooperation with Travel Montana and Wendt Advertising. An interactive survey was created on the Clearwater Research Web site (www.clearwater-research.com) that used the same questions asked in the PI/TV Travel Conversion Study. Three additional questions specific to the Web site experience were also asked.

Similar to the PI/TV Study, questions were designed to determine whether the individual who requested the travel information visited Montana. If they did visit, they were instructed to answer a series of questions about their visit. If they did not visit, they were instructed to answer questions about why they did not travel to Montana. All respondents were then asked to complete demographic and travel-related psychographic questions. A copy of the final questionnaire as it appeared on the Web site is included in Appendix C.

SAMPLING AND INTERVIEWING

The client provided a database of potential travelers who registered in the Travel Montana guest-book. A phone matching service provided phone numbers for the database. Recruiting for potential survey respondents was conducted from September 9 through 18, weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all respondent's local time). A total of 1,883 dialings were made to recruit 704 potential respondents.

A total of 380 interviews were collected on the Clearwater Research Web site from September 9 through October 2, 1997. The responses were reviewed and matched with the recruiting data to insure that the recruited respondent was the survey respondent. Blank and duplicate responses were deleted. A total of 307 surveys qualified for inclusion in the study. The Recruit and Response Outcome Summary can be found in Appendix B.

FINDINGS

The characteristics of the Web site visitors are discussed first. Next, conversion results from the survey are reviewed. Finally, we compare the characteristics of those who did and did not travel to Montana. In general, results are shown in the order of the questions asked. Statistical tests (t-tests, F-tests, and ANOVAs) were conducted with the data to discover trends and significant differences among the respondents and among the responses. Those differences that are statistically significant are noted as such.

We examined overall results, as well as results in three targeted psychographic profiles for Travel Montana advertising (Active Mature, Active Outdoors, and Traditional Family). Survey questions 29 through 31 determined which of the three psychographic cells best fit the respondent. These questions asked about the primary purpose of the respondent's typical vacation, and the type of vacation experience they typically seek out. Of the 307 respondents, all but four fit into one of the three cells.

In addition, comparisons to the PI/TV Travel Conversion Study were made where appropriate. Because the ordering of the questions was slightly different in the two studies, the Internet Conversion Study questions are labeled "I#" (e.g., I5) and the PI/TV Travel Conversion Study questions are labeled Q# (e.g., Q7). If both studies asked the same question (which is most often the case), both numbers are displayed (e.g., I5/Q7).

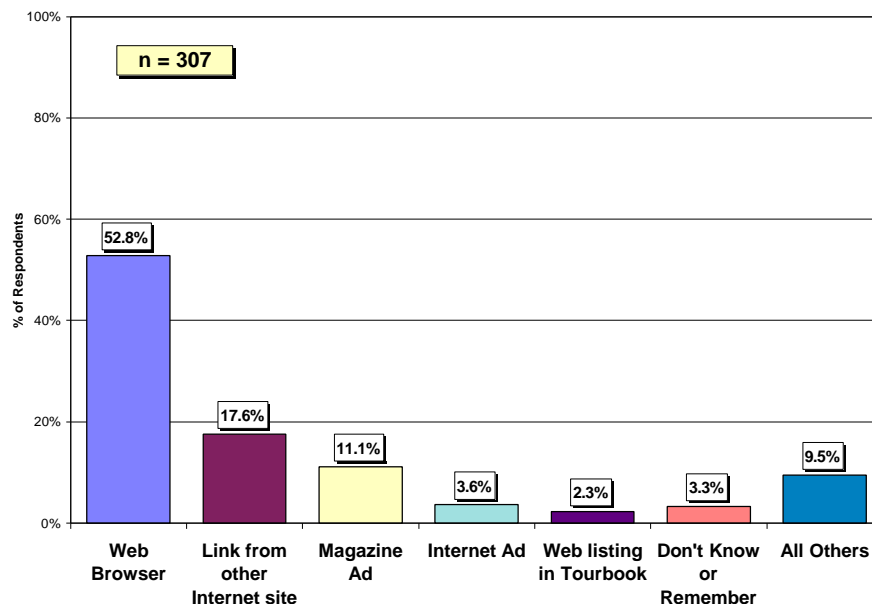
Finally, this study differed from the PI/TV Travel Conversion Study in one other important aspect – a special extra comments section was available to those who responded to the Internet survey. These comments tend to reflect a very positive impression of Montana, and are worthy of perusal. They can be found in Appendix A beginning on page 33.

WEB SITE ACCESS AND INFORMATION REQUESTS

In this section we examine how respondents came to the Travel Montana Web site and what other forms of information they asked for. We also look at the decision-making process of those respondents who visited Montana and the impact of the Web and the additional information they requested on their travel plans.

MOST USE WEB BROWSERS AS THEIR ROUTE TO THE SITE

Figure 1: I2/Q2) What Prompted You to Request this Information? (In other words: How did you obtain the Internet address?)



More than half of all respondents said they used a Web Browser to find the Travel Montana Web site.

Eighteen percent said they linked from another Web site, and slightly more than 10% said they saw the address in a magazine ad.

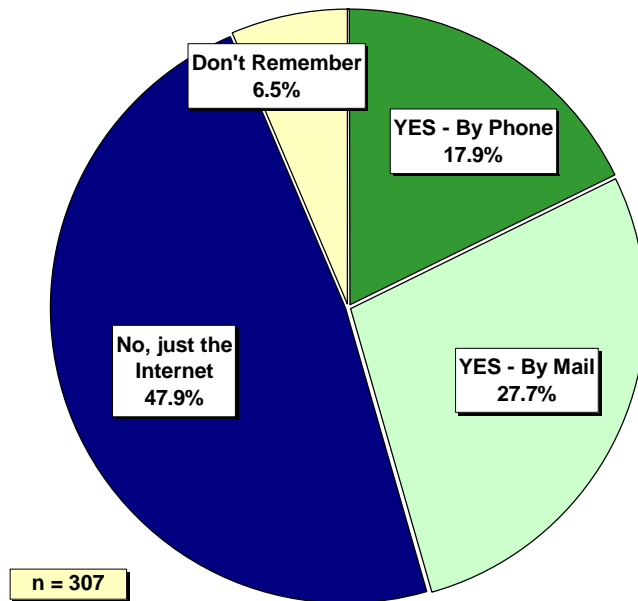
In examining the sample database provided by Travel Montana, we see the following answers to a similarly worded question. The Travel Montana guest-book asked each registrant to "... tell us where you saw our Internet address."

Table 1: From the Guest-book – Where Respondents Found the Internet Address

From an Internet Search Engine	38.2%
From another Internet Site	26.3%
Magazine or Magazine Ad	22.7%
All Others	12.8%

FOR SOME, THE WEB WASN'T ENOUGH

Figure 2: I3) Did You Request Additional Information, or Did You Just Browse the Web Site?



About half of the respondents said they sought other information beyond the Travel Montana Web site.

The majority of those seeking other info did so by *mail*, but it was not specified whether this was postal mail or e-mail.

We assume that, because of the way the guest-book was set up, that these requests were made by e-mail.

It was also not ascertained whether the request for additional information came **before** or **after** the visit to the Web site. The question was worded to imply that the request for additional information came **after** the Web site visit, but not all respondents may have interpreted the question in that way.

Those who traveled to Montana were more likely to have requested additional information (53.5%) than non-Montana visitors (37.2%).

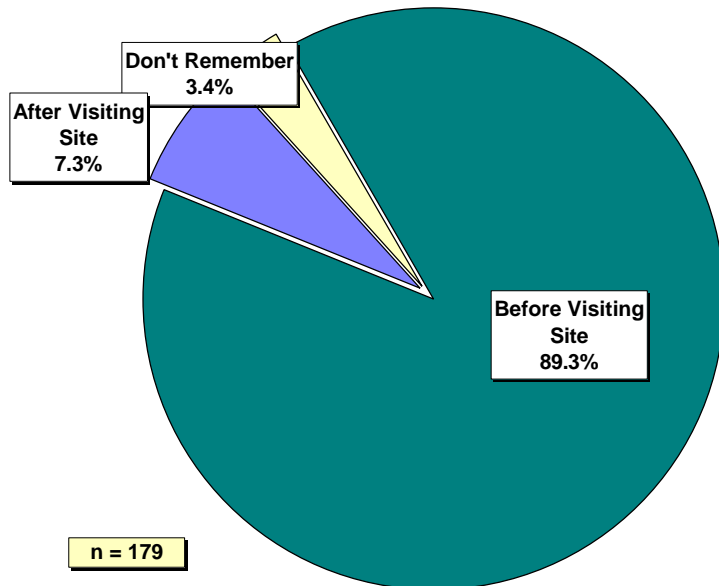
MOST WHO ASK GET THE ADDITIONAL INFORMATION

We asked those who requested additional information whether they received it – nearly 95% (93.8%) of those who remembered said they did.

Also, similar to what we noticed in the PI/TV Conversion Study, those from the 13 traditional market states were more likely to say they received the information (97.5% of those who remembered) than those from distant states (89.6%).

THE DECISION TO TRAVEL MADE BEFORE THE VISIT AND ANY REQUEST

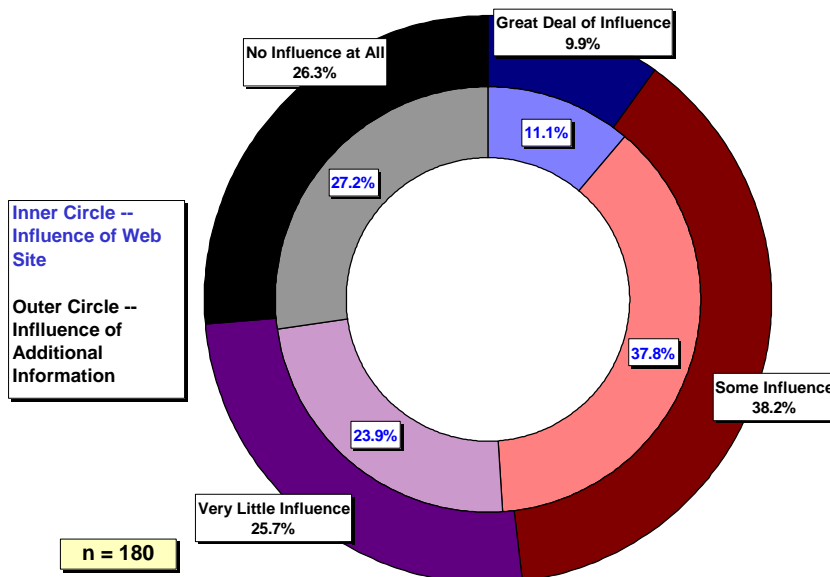
Figure 3: I8) Did You Decide to Travel to Montana Before or After You Visited the Web Site?



The majority of travelers made the decision to come to Montana **before** they visited the Travel Montana Web site.

About the same percentage said they planned to visit Montana before they requested any additional information.

Figure 4: I10 and I11/Q9) How Much Influence Did the Web Site/ Information You Requested Have on Your Decision to Visit Montana?



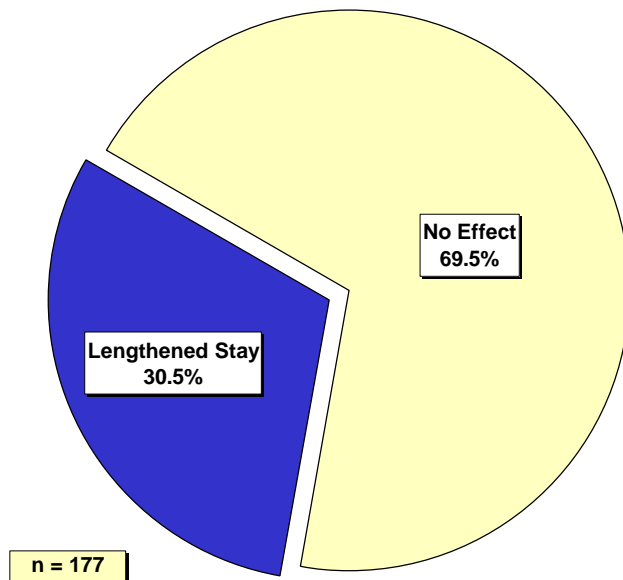
About half said that the Web Site and the additional information they received had *some or a great deal of influence* on their decision to visit.

About one-quarter said it had *no influence at all*.

There was very little difference in the influence levels between information from the Web and the brochure.

THE INFORMATION AFFECTS THE LENGTH OF STAY

Figure 5: I13/Q10) Did the Information Influence the Planning of the Length of Your Stay for Your Vacation in Montana?



Almost one-third of travelers said that their vacation stay was **extended** because of the information they saw on the Web and/or the additional travel information they received.

Like the PI/TV Travel Conversion Study, we see that the decision to travel to Montana was usually made **before** seeking information either on the Web or additional materials by phone or by mail. And, we see again that the information had a strong impact as a **reinforcement** to their decision to travel to Montana.

Those who traveled to Montana had a higher rate of requesting more information, and in actually receiving the information (or remembering that they received it). In addition, more than half said the information had some or a great deal of influence on their travel plans, and about one-third said their stay was **extended** because of the information they received.

We see these results as a confirmation of the importance of having up-to-date travel information available on the Web site. The Web site, like the travel brochure, can have a positive impact on reinforcing the decision to travel and influencing extended travel. Because the Internet can provide **immediate** information, it is important that the information provided to potential travelers is, in fact, up-to-date.

In addition, the fact that up-to-date travel information can be found on the Web site should be highly publicized. If so, it is our belief that travelers already inclined to visit Montana would seek out the Web site for up-to-date travel information (ski reports, lodging availability, etc.) that could influence extended travel.

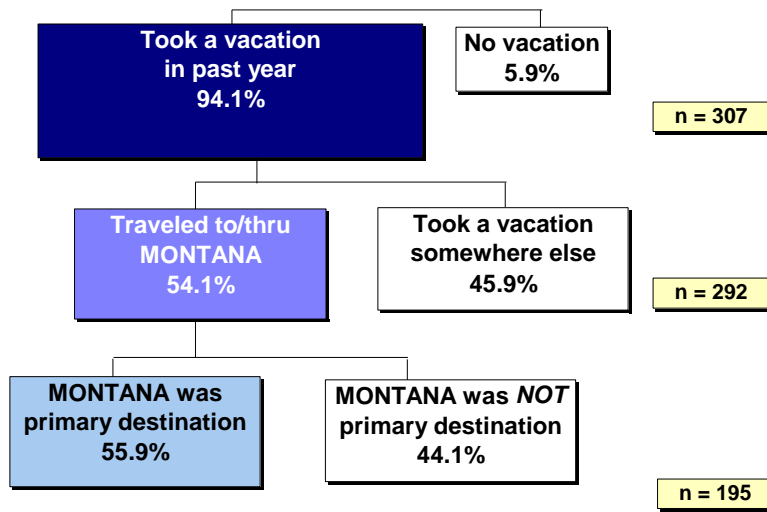
INQUIRIES AND CONVERSION RATES

In this section we briefly look at the inquiries made to the Travel Montana Web site, and examine the effectiveness of the Web site compared to the recent Per-Inquiry and Network television ad campaigns.

INTERNET VISITORS ARE VACATIONERS; THE MAJORITY ARE MONTANA VISITORS, TOO

The database obtained from Travel Montana contained 4,753 registrations in the guest-book. After deleting those with non-U.S. addresses, there were 4,079 registrations. It is this number that is used when calculating total responses.

Figure 6: I5-7/Q4-6) Did You Take a Vacation? In Montana? Was Montana Your Primary Destination?



Almost all respondents who registered in the Travel Montana guest-book said they took a vacation in the past year.

More than **half** said they traveled to or through Montana; and more than half of travelers to Montana said it was their **primary** destination.

Comparisons to the overall findings of the PI/TV Travel Conversion Study show that Internet users from this study were much more likely than those who responded in the PI/TV Study to have taken a vacation in the last year (78.4%). In addition, they were more likely than those in the PI/TV Study to have traveled to or through Montana (32.6%).

Table 2 (on the next page) shows the estimated conversion rates and estimated revenues for the Internet inquiries and the two ad types. We see that the conversion rate for Internet inquiries is over 50%! Also, the length of stay and amount spent per day and per visit are on a par with the TV campaigns.

Table 2: Conversion Rates and Total Revenues

Category	Total Responses	Conversion Rate	Estimated Visiting Parties	Average Overnights Per VP	Ave Amt Spent Per Night	Ave Amt Spent Per VP	Estimated Total Return
INTERNET Inquiries	4,079	51.8%	2,113	5.78	\$144.86	\$837.29	\$1,769,130
Network TV Ads	4,815	37.0%	1,782	5.34	\$134.41	\$717.75	\$1,278,706
Traditional PI	4,820	27.2%	1,311	5.20	\$134.05	\$697.06	\$913,908
Distant PI	3,645	12.7%	463	8.23	\$156.32	\$1,286.51	\$595,558
<i>Not Surveyed PI</i>	11,087	12.7%	1,408	6.71	\$145.19	\$974.22	\$1,371,725
Per-Inquiry Ads (total)	19,552	16.3%	3,182	6.31	\$142.22	\$897.26	\$2,881,191

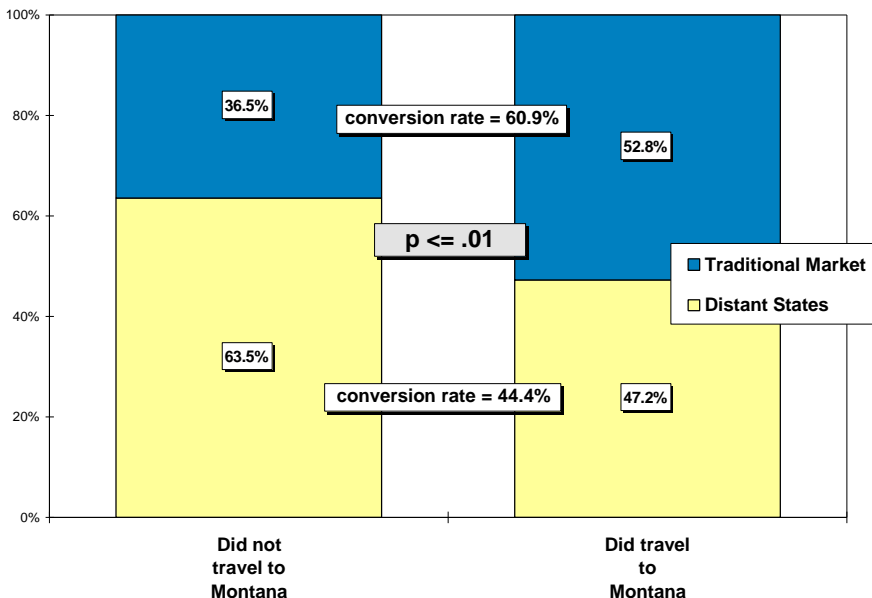
NOTE: The average amount spent per visiting party is calculated by multiplying the average amount spent per day times average overnights per trip.

What does this mean? First, it must be explained that Internet inquiries are not unique inquiries. About half of the respondents mentioned that they ordered printed information (the Travel Montana package) in addition to what they found at the Web site. Some respondents said they saw the Web address on a magazine advertisement or TV advertisement. Therefore we cannot say that the revenue shown above is wholly derived from those who visited the Internet.

What we can say is that when a potential traveler visits the Web site and registers in the guest-book, they are more likely than not to become a Montana visitor. Thanks to the immediacy of the Internet, a Web-user can obtain information about a location or event and take **immediate** action, including booking airline and hotel reservations while on-line. Compare this immediacy with ordering a printed brochure, waiting for the mail, then, once having received it, making plans and calling for reservations. The Internet has an immediacy factor that certain travelers can appreciate, and the Travel Montana Web site fulfills that need well.

However, it should be remembered that the respondents in this study were those who not only visited the Travel Montana Web site, but actually took the time to complete the guest-book. The conversion rate, while high, cannot be transferred to those who merely visited the site without registering.

Figure 7: Conversion Rate by Market



We also found that, like the PI/TV Conversion Study, the traditional markets had a higher overall conversion rate than distant markets.

This may have less to do with proximity than with interest.

While the data are too small to be considered significant, we did see that many states had an extremely high conversion rate – and not all of them were from the traditional markets. Table 3 (on the next page) gives a sample of the number of inquiries and conversion rates by states, showing that some distant states had a high conversion rate, and some traditional states did better than others.

Table 3: Conversion Rates by State

State	# of inquiries	conversion rate
Alabama	48	40%
California	378	44%
Illinois	181	60%
Maryland	83	71%
Minnesota	163	79%
New Jersey	90	29%
Ohio	131	73%
Oregon	105	77%
Pennsylvania	159	50%
Texas	286	45%
Virginia	134	80%
Washington	240	80%
Wisconsin	133	28%

Traditional Market

Distant Market

Higher than Overall Conversion Rate

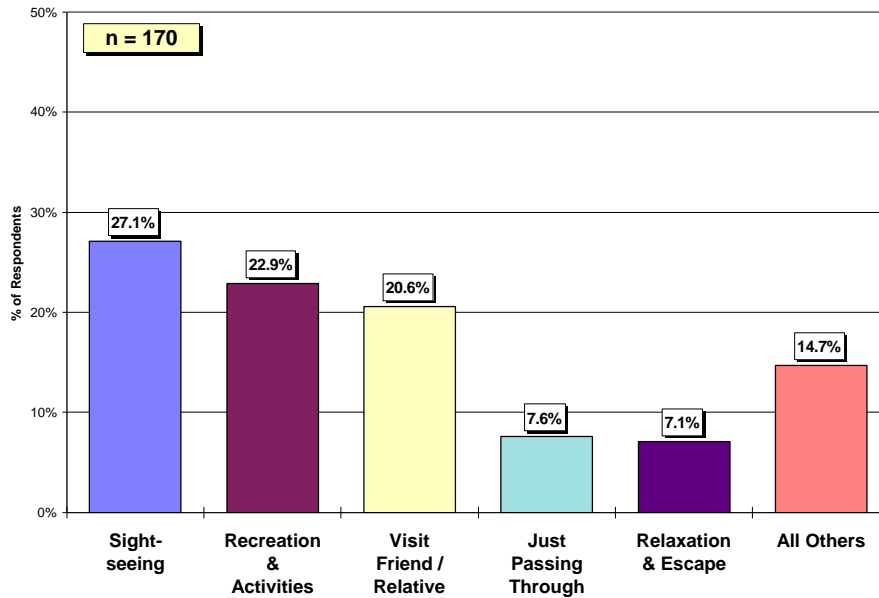
As mentioned earlier, there were several inquiries from outside the U.S., including Austria, Australia, China, Finland, Germany, Great Britain, Holland, Italy, Japan, and, of course, Canada.

MONTANA TRAVELER ATTRIBUTES

In this section we look at the characteristics of respondents who said they traveled to or through Montana. We examine the purpose of their trip, when they visited, how they got there, and who was in the traveling party.

SIGHTSEEING IS THE MAIN REASON FOR THE VISIT

Figure 8: I14/Q20) What was the Primary Purpose of This Trip?

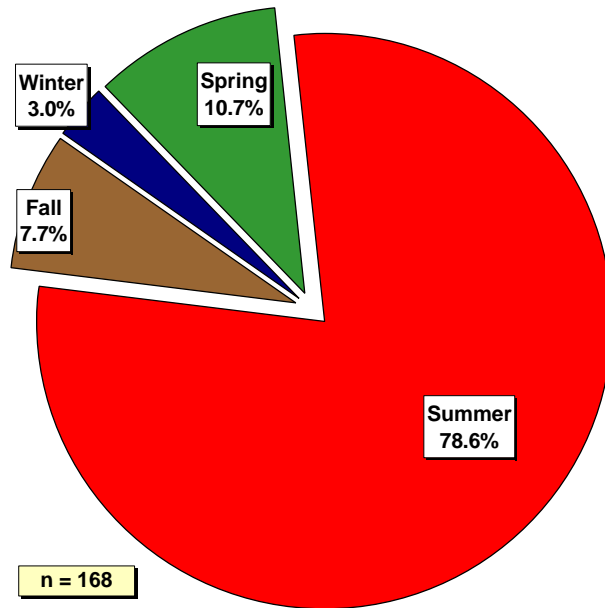


Of those who visited Montana, *Sightseeing* was the most-often mentioned purpose of travel (about one-third of all mentions).

Recreation and Activities, and *Visiting Friends and/or Relatives* were mentioned next most often.

SUMMER WAS THE MOST POPULAR SEASON

Figure 9: I15/Q21) In Which Season Did You Visit?

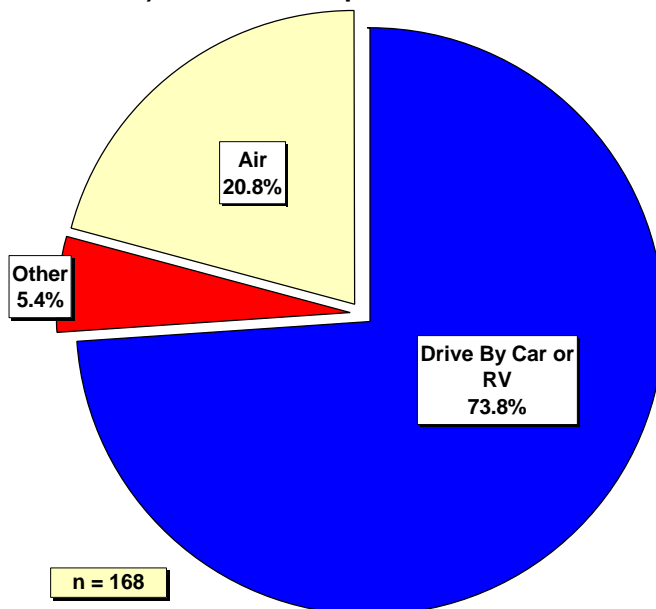


Almost four-out-of-five of those who visited Montana said their most recent trip was in the *Summer*.

This would be expected since the Web site sample was from Spring/Summer 1997.

MOST TRAVEL TO MONTANA BY CAR; AIR TRAVEL ALSO NOTABLE

Figure 10: I16/Q22) Form of Transportation Used to Visit Montana

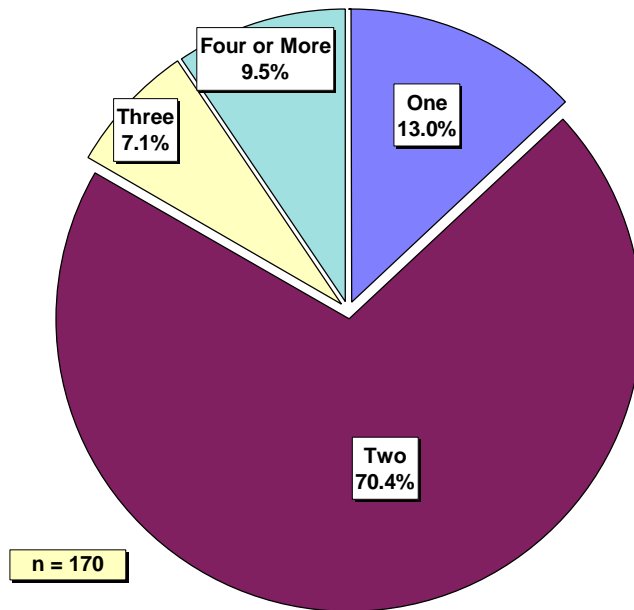


Most travelers came to Montana by *Car* or *RV* – in fact, almost two-thirds of those from the distant market states were more likely to say they came to Montana by car (64.6%).

Of those who came by air, almost three-quarters were from distant states.

TWO ADULTS IN THE TRAVELING PARTY IS THE NORM

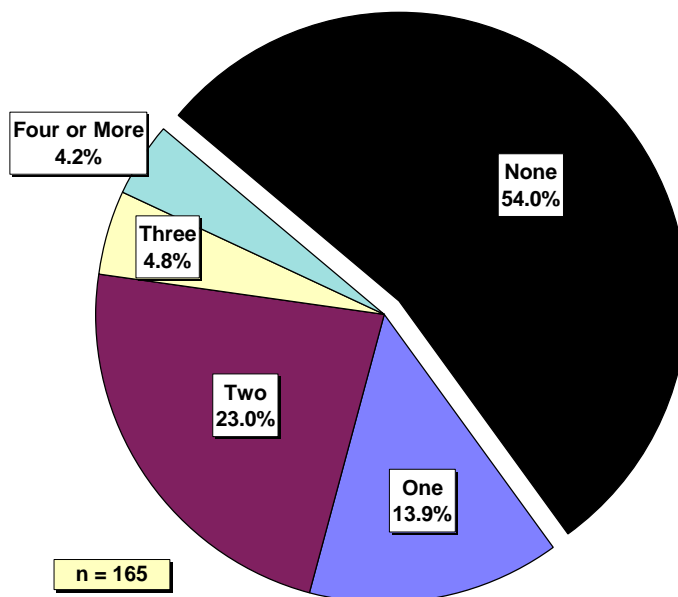
Figure 11: I17/Q23) How Many Adults Were in the Traveling Party?



Slightly more than two-thirds of the respondents who visited Montana said their traveling party consisted of two adults.

ALMOST HALF BRING THE KIDS

Figure 12: I18/Q24) How Many Children Were in Your Traveling Party?



Slightly more than half of all respondents said there were no children in their traveling party.

Respondents with children living at home were much more likely to have children in their travel group than those with no children at home.

COMPARISONS WITH THE PI/TV TRAVEL CONVERSION STUDY

The findings for family composition are dissimilar to what we found in the PI/TV Travel Conversion study. In that study, the “two adults, no kids” traveling party was the norm, as almost half of the Montana visitors fit that description. In this study, we see that “two adults, no kids” is a *fairly* apt descriptor. However, those who registered in the Web site guest-book and traveled to Montana were more likely to bring children as a part of their traveling party than those who responded to the TV ads, especially when the respondent indicates there are children living at home.

There were other contrasts between respondents in the two studies that help to give us a definition of the Web Site traveler demographic. Table 4 highlights some of those differences.

Table 4: Demographic Comparisons of All Respondents in the Two Studies

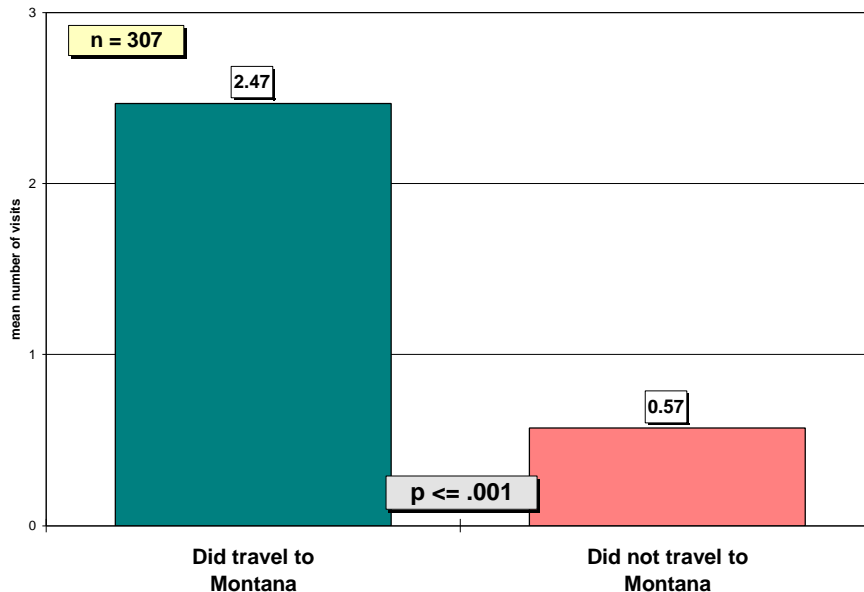
	Internet Study	PI/TV Study
Gender – Male	69%	58%
Mean Age	45.5	47.9
College Degree or higher	59%	38%
Income – over \$40K	88%	57%
“ – over \$80K	33%	16%
no response to income question	8%	15%

We see that respondents to the Internet Travel Conversion Study tend to be only slightly younger, and males are a bit more prevalent. On average, they are better educated and their household income is significantly higher than those who responded to the PI/TV Travel Conversion Study.

TAKE ME BACK TO MONTANA – AGAIN

In this section we look at respondents' previous travel history and its relation to traveling to Montana this year.

Figure 13: I27/Q33) Average Number of Times Respondent Has Been to Montana in the Last 5 Years



Most Montana visitors said their was a **return** visit.

Almost half said they had been there twice or more in the last five years; nearly one-third said they visited three times or more.

About 70% of those who did not travel to Montana said they had never been there.

DEMOGRAPHIC PROFILE OF THE TYPICAL TRAVELER

Considering the patterns discussed above, we can say that a “majority profile” of travelers to Montana who also visited the Travel Montana Web site looks like this:

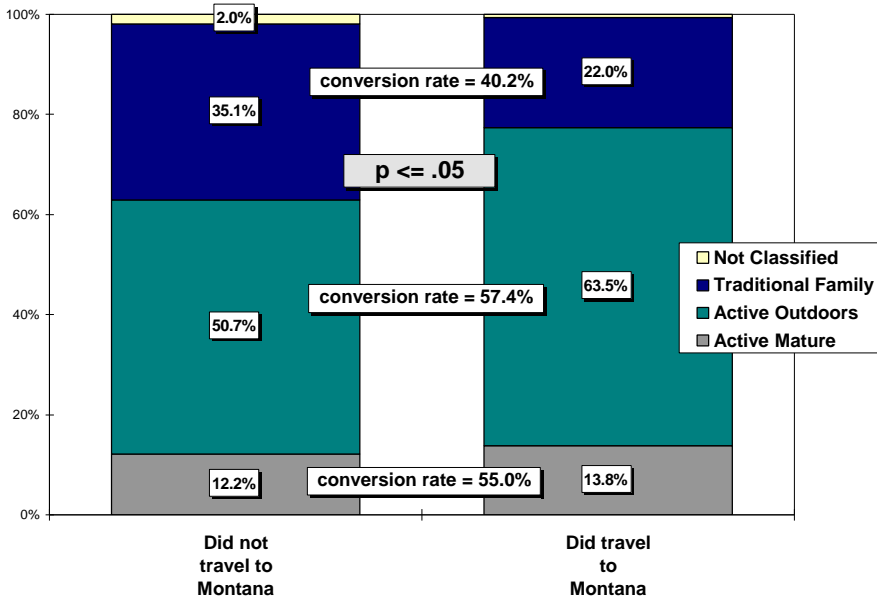
- two adults,
- average age in the 40's,
- well-educated,
- better-than-average income, and
- they've been to Montana previously.

If they have children living at home, they usually bring them. If not, there are usually no children in the traveling party.

WHO VISITS? ACTIVE OUTDOORS

In this section we look at the psychographic description of vacationers.

Figure 14: Psychographic Profile of Respondents and Travelers



Almost 60% of all respondents and nearly two-thirds of travelers to Montana fit the Active Outdoors psychographic profile, described as those looking for their ideal vacation as “relaxation and adventure in a natural setting.”

Their conversion rate was about the same as the Active Mature group (*sightseers ages 55+*), and both were higher than the Traditional Family group (*relaxation and a variety of activities*).

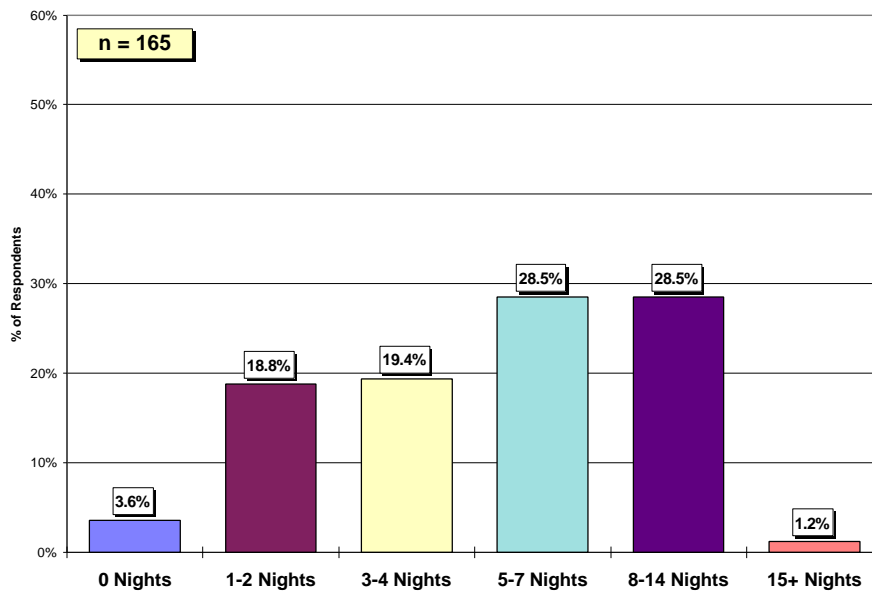
We found a similar trend in the PI/TV Travel Conversion Study. In that study, about half of all respondents were in the Active Outdoors psychographic, and that group had a better-than-average conversion rate.

TRAVELER ECONOMICS

In this section we look at overnight accommodation patterns. We also examine how long visitors stayed, how much they spent, and their overall economic impact.

TRAVELERS STAY ALMOST SIX NIGHTS

Figure 15: I19/Q25) How Many Nights Did You Stay in Montana?

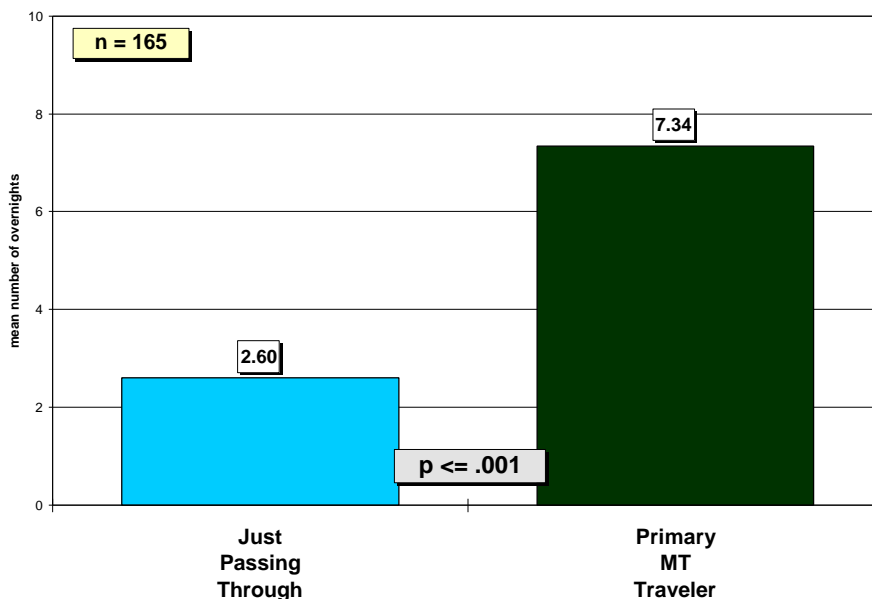


The average length of stay per visit was almost six overnights (5.78).

This was nearly identical to the length of stay in the PI/TV Travel Conversion Study.

About 30% said they stayed 5-7 nights; another 30% said they stayed longer than a week.

Figure 16: Average Number of Overnights by Traveler-Type

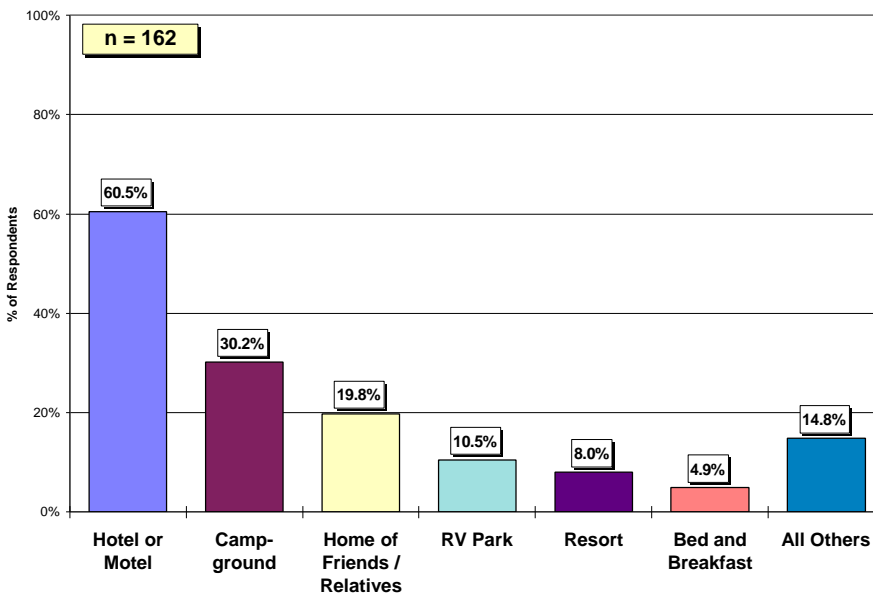


Of course, those who were just passing through stayed fewer nights than those who made Montana their primary destination.

Still, the former group averaged about 2 ½ nights per visit.

TRAVELERS STAY IN MOTELS AND CAMPGROUNDS

Figure 17: I25/Q26) What Accommodations Did You Use During Your Stay? (multiple response)



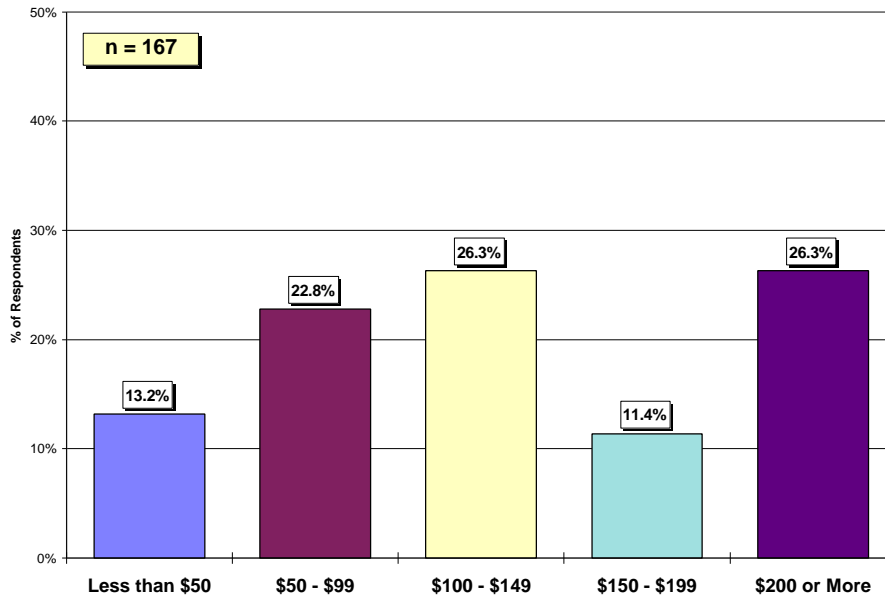
Hotels or Motels were the choice of the majority of travelers; *campgrounds* were next-most mentioned.

About 20% said they *stayed with friends or relatives*.

Active Outdoors respondents were more likely to mention *campgrounds* (40%) than Traditional Family travelers (17%) or Active Mature vacationers (8%).

VISITORS SPEND \$145 PER DAY PER PARTY, FAMILIES SPEND MORE

Figure 18: I21/Q27) How Much Did Your Party Spend Per Day?

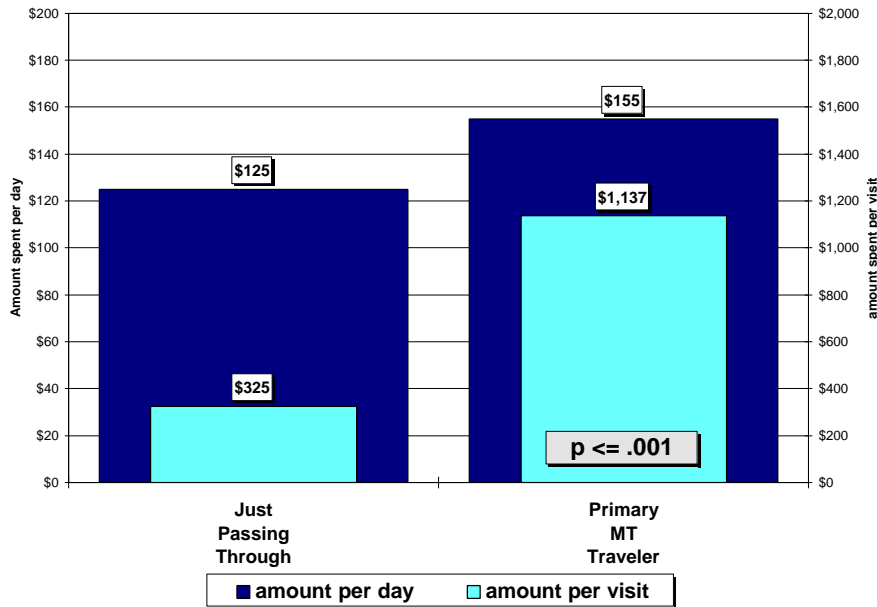


The average amount spent per party per day was just under \$145.

These figures include all expenses except travel-related expenses (such as airline fares and gas).

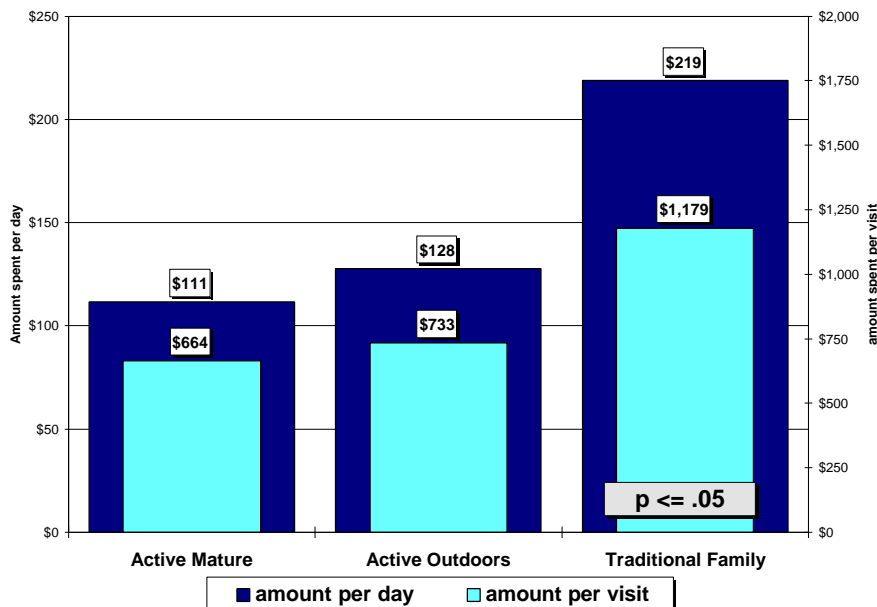
Combined with the average stay of 5.78 overnights, the overall average amount spent per visit was about \$840 per traveling party (multiplying the amount spent per day by the number of overnights).

Figure 19: Average Amount Spent per Day/Visit per Traveler-type



Those who were just passing through spent less per day (and per visit) than those who made Montana their primary destination.

Figure 20: Average Amount Spent per Day/Visit per Group



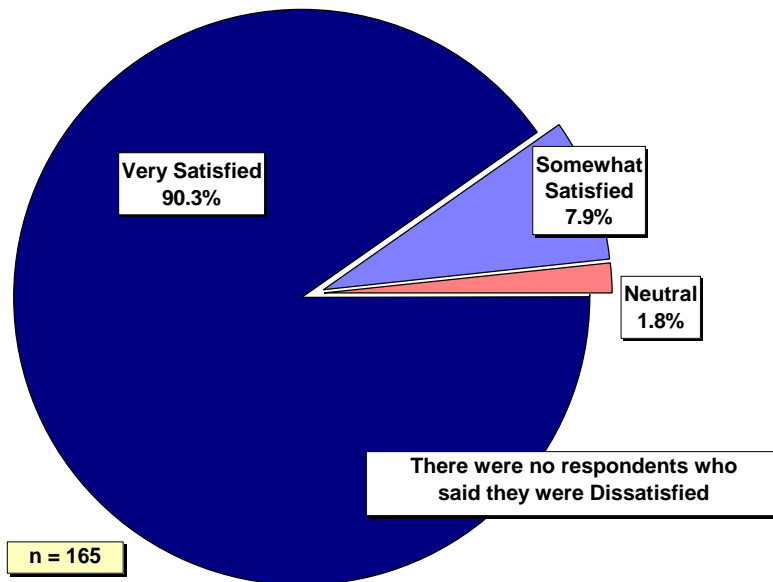
Traditional Family vacationers spent more per day and more per visit than the other two groups. So while the other groups converted better, the Traditional Family group proved to be the higher-value vacationers.

FUTURE TRAVEL INDICATORS

In this section we look at the satisfaction level of travelers to Montana, their likelihood of returning, and their interest level in a Lewis-and-Clark Trail vacation.

MONTANA TRAVELERS SATISFIED; MOST WOULD RETURN

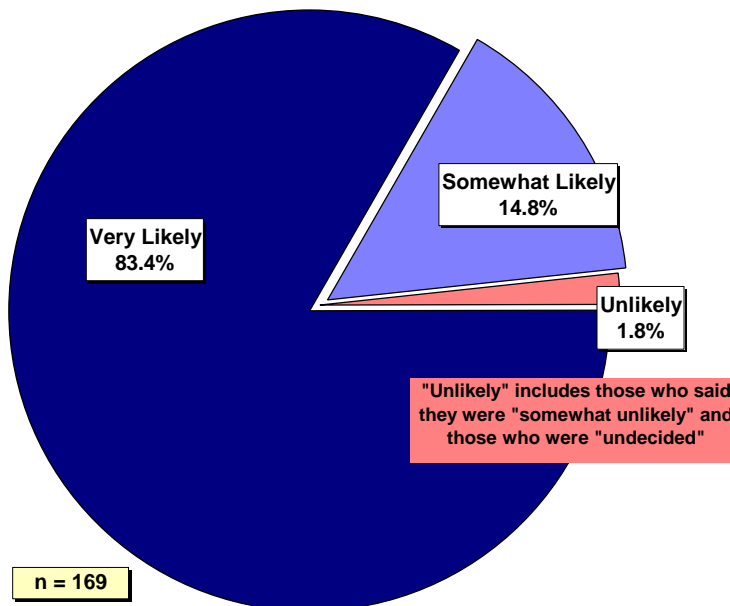
Figure 21: I22/Q28) How Satisfied Were You With Your Trip?



Most respondents were *very satisfied* with their visit.

There were **no** respondents who indicated dissatisfaction and less than 2% who were neutral on the subject.

Figure 22: I23/Q29) Likelihood of Another Trip to Montana



More than 80% said it was *very likely* that they would take another trip to Montana.

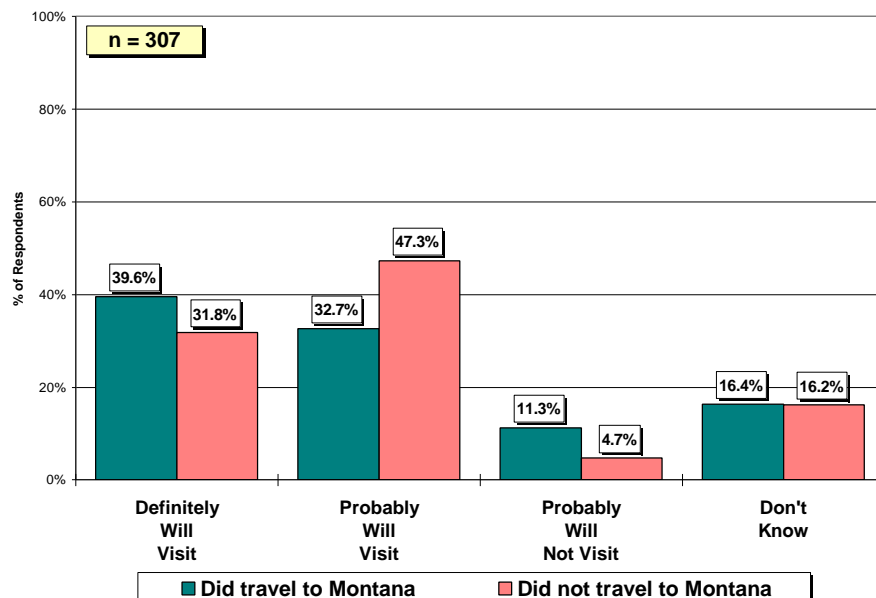
Just 2% thought it *unlikely* that they would return.

Based on these results, and the fact that those who traveled to Montana indicated they had visited Montana in the past, it would appear that travelers who have been to Montana were satisfied and **proved** it by returning for another visit.

VISITING MONTANA – IF NOT NOW, SOON

In this section we examine future travel plans of visitors and non-visitors, including the likelihood of taking a trip related to the Lewis & Clark Trail.

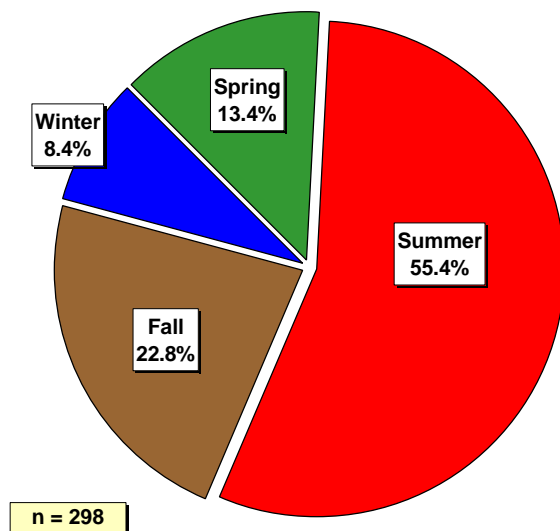
Figure 23: I25/Q31) In the Next Two Years Would You Say You...



When asked if they would visit Montana in the next two years, about three-quarters of all respondents said they intend to visit.

Just 8% said they probably would **not** visit in the next two years.

Figure 24: I26/Q32) In Which Season Would You Return to Montana?

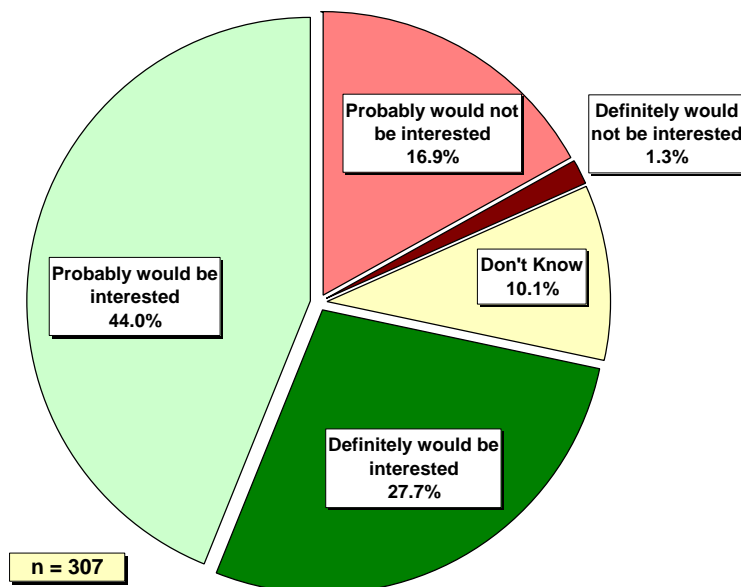


Summer was the most popular time for future travel, mentioned by slightly more than half of all respondents.

In addition, *Fall* received a substantial number of mentions.

The high percentage of Fall travel plans could be because of the number of respondents who said the information was for a trip to be taken at a later time.

Figure 25: I32/Q37) Interest in a Vacation Following the Lewis & Clark Trail



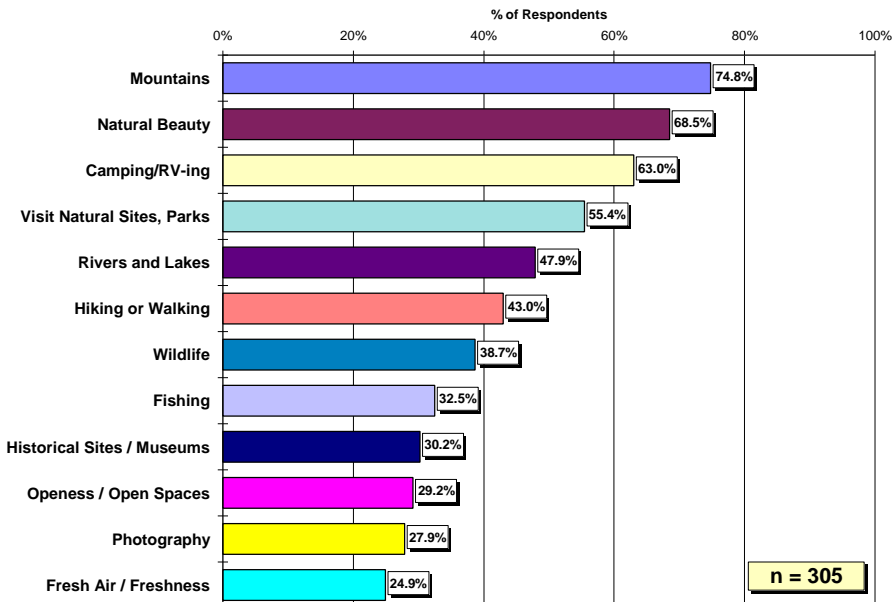
Almost three-quarters of all respondents said they would be *somewhat* or *very interested* in a vacation that followed the Lewis & Clark Trail.

Those who took a vacation this past year were more likely to be interested than those who did not.

MOST THINK OF MOUNTAINS AND NATURAL BEAUTY

In this section we look at the responses to the perception question about Montana vacations.

Figure 26: I28/Q15) When You Think of a Montana Vacation, What Comes to Mind?



Both travelers and non-travelers gave similar answers to this multiple-response question.

The answers, for the most part, are similar to those given in the PI/TV Travel Conversion Study.

However, both *Camping/RV-ing* and *Hiking or Walking* ranked much higher in this study compared to the PI/TV Travel Conversion Study. The top two selections – *Mountains* and *Natural Beauty* – remained the same.

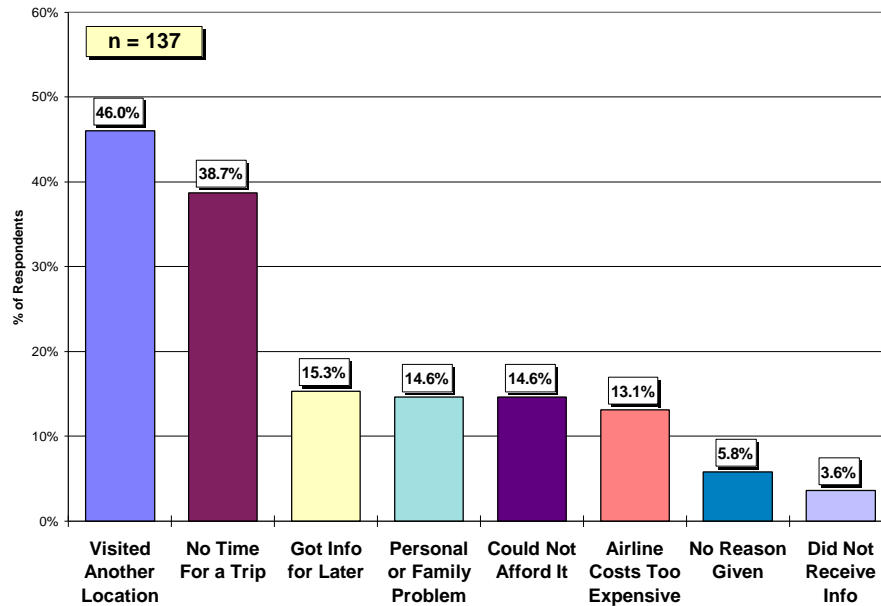
Unlike the PI/TV Travel Conversion Study, respondents were not limited to just five answers. The questionnaire *said* they were limited to five, but there was no programming in place to actually limit the number of responses. Many respondents marked many answers to this question. The average number of responses was slightly over six per respondent.

NON-TRAVELER PROFILE

In this section we examine the reasons respondents gave for not traveling to Montana.

THEY WENT SOMEWHERE ELSE

Figure 27: I24/Q30) Reasons for Not Visiting Montana Last Year (multiple response)



Almost half of those who did not visit Montana did go elsewhere on a vacation

This could be expected as almost all respondents indicated that they took a vacation in the past year.

About 40% said they had *no time for a trip*. Because most all respondents said they took a vacation in the last year, we assume they meant “no time to take a vacation in **Montana**.”

About 15% said they *could not afford it* and another 13% specifically cited *airline costs were too expensive*.

There were 16% of respondents who said they got the information for “later.” As we mentioned above, this may explain the high percentage of respondents who indicated that they probably would travel to Montana in the fall.

Almost 4% of all respondents gave “*I Did Not Receive the Travel Information*” as one of their reasons for not visiting.

CONCLUSIONS AND RECOMMENDATIONS

The Internet is a viable tool in a travel promotion campaign. Based on the conversion rate and the time/money spent per visit, those who visited the Travel Montana Web site and traveled to or through Montana are the types of travelers that any state would seek out.

Most Web/Montana travelers are in the Active Outdoors segment. The majority of converted travelers in this study fit the Active Outdoors psychographic, and this group had the highest conversion rate. They also seem comfortable with the Internet technology and are able to put it to good use in finding the information they seek about Montana vacations.

WEB SITE PROMOTION RECOMMENDATIONS

Promotion of what the Web site offers is key. Since the Web site seems to be an attractive alternative to those potential travelers who are comfortable with Internet technology, promotion of the site is essential.

Immediacy is another key. In addition, if the site offers up-to-date information for those who obtain the bulk of their travel information “the old-fashioned way” (by mail brochure), it can reinforce or even extend existing travel plans. The Internet’s ability to provide up-to-date information immediately when the traveler wants it (versus waiting for a brochure in the mail) can be seen as an attractive feature of the Web site.

Reinforce promotional themes on the Web site. Another potential benefit of the Web site can be its ability to focus on specific promotional themes for reinforcement of special travel events. The upcoming Lewis & Clark celebration could be just such an event.

PROFILE OF THE “TYPICAL” INTERNET USER/MONTANA VISITOR

To summarize the demographic, psychographic, and economic profile of the “typical” respondent who visited the Travel Montana Web site (comparisons to the findings of the PI/TV Travel Conversion Study are in *italics*):

- ◆ The majority who registered in the Travel Montana guest-book were travelers, as almost all (95%) said they took a vacation in the past year (*the percentage who took a vacation in the past year was higher compared to travelers in the PI/TV Study, where about 78% said they took a vacation*).
- ◆ They made their decision to travel to Montana **before** getting on the Web site and ordering travel information.
- ◆ The information on the Web site and any additional information they received helped to reinforce their decision to travel to Montana, and in some cases respondents said the information resulted in a longer visit.
- ◆ Almost two-thirds fit the Active Outdoor psychographic profile (*compared to slightly over half of the travelers in the PI/TV Study*).
- ◆ The majority say that Montana was their **primary** destination.
- ◆ There are typically two adults in the traveling party, 40 years of age or older, with substantial income (*compared to travelers in the PI/TV Study who are slightly older with moderate income*).
- ◆ If they have children living at home they include them in the traveling party; if no kids at home the traveling party is usually two adults (*compared to travelers in the PI/TV Study who usually say they have two adults and no kids in the traveling party*).
- ◆ Summer visits were most likely.
- ◆ The average stay included six overnights, usually in a motel or hotel, with campgrounds the second choice.
- ◆ The average amount spent per day (excluding travel costs) was about \$145; the average amount spent per trip was almost \$840 per traveling party (*compared to \$138 per day and \$800 per visit in for travelers in the PI/TV Study*).
- ◆ Those who had made previous trips to Montana in the past five years were more likely than those who had never been to Montana to have visited Montana this past year.
- ◆ Most travelers were very satisfied with their most recent visit – no respondent was dissatisfied – and they are very likely to return, probably in the next two years.
- ◆ Both travelers and non-travelers showed an interest in a future trip that followed the Lewis & Clark Trail.

APPENDICES

APPENDIX A – OPEN-ENDED ANSWERS FROM THE SURVEY

2. What source prompted you to browse the Travel Montana Web site? In other words: How did you obtain the Internet address?

RESPNUM	Q2OTHER
88	Travel Expo
203	trip planned
539	Fly Fisherman
815	would like to travel to Montana some day.
969	Just a thought on my part
1014	Personal interest. used to live in MT
1507	always wanted to visit
1537	I used to live there
1631	We love CO and WY. so interest exists in Montana
1657	Looking for info because of being stationed at Malmstrom in 1973-74 and desire to revisit the state.
1740	Visited Little Bighorn for military research
1866	Planning a trip in October
2091	Interested in traveling to Montana
2167	traveled Montana several times

14. The next few questions are about your MOST RECENT trip to Montana... What was the PRIMARY purpose of this trip?

RESPNUM	Q14OTHER
44	My wife's father had lived there as a young man and had told us of the beauty of the state.
577	research for move
1347	I requested the info to try and set up a trip to forefathers lands.
1566	My family is considering moving to Montana

16. What form of transportation was used to visit Montana?

RESPNUM	Q16OTHER
2139	Bicycle

20. What accommodations did you use while visiting Montana on your most recent trip?

RESPNUM	Q20OTHER
48	Western National Rendezvous
237	Glacier Park Lodge
644	Yellowstone park in Wyoming
771	Yellowstone Lodging
960	lodges in Glacier Natl. Park
1544	Yellowstone ecosystems studies-Cooke City
1575	Cabin in Glacier Natl. Park
1708	lodge at Yellowstone
1936	national park

28. When you think of a Montana vacation, what thoughts come to mind? Review all the possible answers below, then, please select UP TO FIVE of the answers.

RESPNUM	Q28OTHER
58	GOLF
66	trying out the speed unlimited...
104	horseback riding
131	employment seeking
172	horseback riding
340	Horseback Riding "Out Fitter" trips
492	sincerely friendly people
741	business. with convenient access to national parks
860	golf
902	horseback riding
1039	Different culture / atmosphere
1303	culture of Native Americans
1419	Visit area where I spent 3 years in the USAF
1479	Annual trip to the Schively ranch
1482	The Great Northern Railway
1498	MOTORCYCLE RIDING
1567	HOME! (I grew up there)
1651	almost all of the above
1657	The open spaces. independence of the people and just rekindling of past.
1758	horseback riding
1867	rockhunting
1995	close to state parks and national parks
2202	horses

Additional Comments:

RESPNUM	Comments
43	Thank you for a wonderful Website. My primary interest in visiting your website was to learn more about Montana. My husband is in the Air Force and we would both like to eventually relocate to Montana. although it will be a few years until we will be able to relocate. In addition. Montana is a state we are seriously considering as a place to live when he retires from the military in less than eight years. and although I have not had the pleasure of visiting your state. my husband has. Thank you.
44	Montana is a beautiful State and my wife and I someday hope to have lots of time to spend there. I really hope that a lot of other people don't find out about it. Even though it is a great big place. the sense of being "on your own" was very special. I would also encourage the State to take some action toward providing more guidance in traveling in a reasonable and prudent manner on state highways. Although we did not observe anyone driving in a reckless manner the recent publicity about the increase in traffic deaths was a concern.
66	I have two friends that live in Montana, and they have been telling me how nice it is there...and if I possibly can, we will fly there next summer and rent a car. and take in the sites...have been all over the country riding trains...steam engines if possible...going to Colorado. for the 5th time in just a few days...when the beautiful aspens are golden..
103	I have just come back from a vacation to Montana. I was in the Glacier National Park area and must say it is the most beautiful place I have ever seen. The Going to the Sun road is the most beautiful road I have traveled on. I hiked a trail at the Logan Pass visitor center and was lucky to see a grizzly bear off in the distance. Hidden Lake is awesome! One thing that was a bit of an inconvenience was that most every lodge and restaurant was closed for the season. Why must they close so early? I think they should at least wait until the end of September to close. But anyway. we managed to find appropriate accommodations and food. I definitely want to return to Glacier National Park! Sincerely. Faye Raya-Norman
104	Would like to visit Horse Whisperer country.
124	you need to advertise more in Arizona. especially Flagstaff. many of use travel to Montana each year and more are traveling north out of here on our way to Alaska. I just don't see much on Montana in Flagstaff.
152	Thank you for the information I received. I am flying to Billings on 9/16/97 for a weeks vacation. I am also considering a skiing trip this winter.
163	What a great way to gather information :)

Additional Comments:

170	My husband and I are both retired. The main reason we are planning a trip to Montana is to go to Billings. where my father was born. as I have never been there.
172	My family and I just returned from a month long vacation to Montana. We traveled all over the state in our private plane which is a great way to see Montana. We had a 100% perfect time. We envy anyone who gets to live in such a wonderful state!
177	I look forward to visiting your state in the next couple of years.
237	It's difficult to limit my praise for Montana. It had to be one of the most soul-touching holidays I've ever spent.
258	One thing that would make finding information a little easier to gather is to have the webmaster for websites make sure that all email addresses are current and active. On more than one site I have submitted email/online requests or responses and have had the response returned undelivered. Very frustrating and makes me question the professionalism of the organization I am trying to contact. Respectfully Dick Chase
288	Really planned to visit. but illness this summer kept us at home. Look forward to this next spring. for sure. James
350	We loved Red lodge. it is quaint. clean and undiscovered. We found it hard to get to. but well worth the effort. Sawtooth Pass was spectacular. but a bit of a let down when we got over the pass and there was very little to do in the next town in Yellowstone. We may have stayed there if there had been more touristy attractions or more to do.
400	My other purpose for traveling to Montana is to receive info to move to Montana.
440	Question #37 is one I do not answer for anyone...
492	I did not request additional information but did receive some anyway.
497	I have been dreaming about Montana since I was 16 years old, and to me there is no place like Montana and I mean that in a good way!
515	I would be interest in some information on activities/vacation sites that are geared for the family.
644	I had written in hopes of being able to visit Montana also on our trip west. but two weeks was just not long enough. We will go again with the idea of visiting your state and the northwest. we have set a time for our next trip is Israel in the spring--then we will make the decision for our auto tour.

Additional Comments:

714	I requested additional information through the web site and it came by mail
717	Many years ago we were in Montana. and enjoyed it very much. Have always wanted to go back. Enjoyed Glacier National Park very much. and camping in our RV. Unless the health and aging process changes a bunch I suppose we will never get to go again. We take care of my aging Mother who has Alzheimer's and she is in better health. (Physically) than I am. Taking care of her is a tremendous drain on our health and "sanity." but there doesn't appear any way out! Take care of Montana for all those who come in the future!
739	Even though this web site did not directly influence our decision to visit Montana. it gave us helpful information for our visit. Whenever we start planning vacation destinations. the web is one of the first places we visit. Having a good website is a must. I was very pleased with the Montana website and they were very prompt in sending us information.
741	We are going to Montana next week. We love Montana. We are in the registered cattle business(Hereford and Angus) and will be there for sales. But whenever we can take the whole family. we always try to get in as much sightseeing as possible. This trip we want to go to Glacier and the Museum of the Rockies.
762	I thought Montana and Utah had the best travel information on the websites I visited this summer in planning my trip west for next year.
799	I was fortunate enough to have a great-uncle who owned a beef cattle ranch in Montana. and in 1969. I visited him with my family. He is gone now but I am looking forward to taking my children to Montana in the next few years.
840	Spent 2 great weeks in Montana in 1993 at Glacier National Part and certainly will return in the next few years.
857	Although I visited Montana before seeing the site. I plan on making extensive use of the site to plan my next trip. I find the site to be very informative.
860	I have enjoyed traveling in the State of Montana. I have been to quite a few National Parks and Glacier National Park is at the top of my list - especially for its beauty. I have a 4-year-old boy and I want him to enjoy seeing Montana. Probably seeing Montana in a couple of years would make more sense since he would be 6 years old and he could enjoy and understand more of what he was experiencing - of course Mickey Mouse is really HIGH on his list.
942	Loved Montana! It was just beautiful. The only problem was not enough time to spend there.

Additional Comments:

957	We love traveling to Glacier Parks and vicinity. Your wilderness areas located near city services are great in the Whitefish and Kalispell areas.
969	I love your Montana and would move there in a heartbeat! I know you don't want anymore transplants. but I am a pretty good person. My parents retired there. and maybe someday I can too!
982	We loved our trip to Montana. We stayed at Big Mountain Ski Resort and had a great time! The hospitality was excellent! The mountain views spectacular. The air - pure and fresh. Glacier Park is one of the country's jewels. We loved our trip to Montana!
983	I also am interested in sending my daughter and son-in-law on a belated honeymoon to your state for winter activities. esp. skiing. romantic weekend. lodging with an outside hot tub. relaxation. I have always loved the beauty of your state when I visited it over 25 years ago! I especially want to see Glacier National Park and maybe head up into the Canadian Rockies. I enjoy scenery. wildlife. water rafting. and just relaxation in front of a cozy fire or relaxing in a hot tub outside enjoying the glory of the mountains! Thank you for asking me to participate in this survey.
999	Canoed down the Smith River. I appreciate the attention given to keeping it uncrowded and natural.
1012	my wife and I had a wonderful vacation in MT this is a high priority to come back to MT also would like to say the people of MT were very gracious hosts and the campgrounds and RV parks we frequented were some of the cleanest and friendly people we've met
1023	We Love Montana!
1097	I requested Montana travel information on Aug. 13. 1997 for our vacation in and through Montana the week of 9/5/-12/97 but never received any- thing. We did pick up information at an information center but without having time to look over it before hand I am sure we missed out seeing a lot of sights and interesting places in the area we traveled in or close to. The information I requested on (North Dakota. South Dakota and Wyoming - all on the Internet) was all received within a week. as of yet there is nothing from Montana. I guess I'll have to wait until vacation time rolls around again and try again. -- The address I used for the request was shughe@missc.state.wy.us
1259	I was disappointed not to go to Montana this past summer. We had reservations but canceled two days prior to leaving because of my husbands jobs. We will probably plan a vacation in Montana within the next two years. The web site and the information I received after requesting it on the web site was very helpful.

Additional Comments:

1266	Please bear in mind that I am from the neighboring state of ND. so Lewis & Clark and out-door activities in general are similar to my own state. I primarily go there to fish at Fort Peck. I do enjoy Missoula and Kalispell and the mountains in general but my state is not as stressful as say. Illinois. so a lot of the questions don't really apply to me as a visitor. We are more like a sister state.
1304	My parents are planning a trip to Montana in the next year and I hope to be able to meet them there. I look forward to any and all information you can send. Rita E. Johnson. 1317 Delgado SW. Albuquerque. NM 87121
1309	During my visit to see my son in Montana I was so impressed that I now plan on moving to the Great Falls area this next spring. The state has a natural beauty that takes your breath away.
1320	I am very disappointed that I have yet to receive any information that I requested on line.
1330	I was interested in the site because my daughter need information on Montana. She had a school report to do. Thank you
1337	We love Montana and have land on the Madison River outside of West Yellowstone. Hope to build there someday...Try to get out as many times as we can. Our current summer home is in Island Park. ID
1362	I love Montana and will visit as often as I can. You have a beautiful breath taking state. I hope to retire there.
1379	I would love some more information on Montana and a variety of places throughout the states. One day I plan to take a road trip all over the US. Thank you for your time. Mellisa
1388	Montana has been a favorite place of mine since I was twelve years old and traveled to Glacier National Park. It is my hope some day to acquire either a vacation home or set up permanent residence in Montana. I love the people. the air and the views of northwest Montana. I am continuing in a graduate nursing program with the specific intentions of relocating to northwest Montana with my family.
1393	Need more than 5 choices of why Montana
1419	As mentioned earlier. I am planning a 2+ weeks trip through Montana with a focus on visiting the Great Falls area where I spent 3 years in the 1960's at USAF - Malmstrom AFB. I want to plan visits to other sites that my wife & I would enjoy (dude ranches. parks. wilderness areas. etc.). I expect planning will take a number of years especially if I make the stay 3 or more weeks.
1423	We had a wonderful time in Montana traveling from Bozeman to areas of Yellowstone. We took the trail through the BearTooth Mountains and must agree with Charles Kuralt that this is the most beautiful highway in the U.S.

Additional Comments:

1438	I am an avid fly fisher. I am very interested in recent developments involving the Montana stream access law. whirling disease. that damn gold mine (I forget the name—you know the one I mean.) etc. My trip to Montana last summer was a family vacation. My next trip west will likely be a fishing trip. I enjoy fishing in Montana. but I am very concerned about the impact of the items I listed above. I don't mind spending my money. but I won't drive across the continent to a place where the fishing is poor or that I have to pay to fish-like Armstrong's or DePuy's.
1461	We were disappointed with our stay at Big Sky Resort this past July (torn up areas due to construction. limited organized activities for kids etc. - with no break on room rates). We really liked our stay. however. at Kelly's Inn in West Yellowstone.
1485	We were out last summer. We enjoyed the natural beauty. The people were very nice to us. We hope to visit again in the near future. You have one of the most wonderful state we have visited don't let anyone ruin it. please.
1509	Your web server was unavailable last night when I tried around 11:30pm Central time.
1521	Montana is a really great place. but things are far apart. Further. there are a number of areas within the state that are not so interesting (much of eastern MT). The literature and web sites (not just this one) was helpful. When planning a vacation to a place like Montana. the ability to get information over the Internet is essential. For instance. I found a web site that was set up by a frequenter of Yellowstone. We shared emails and he included emails of from people that summarized their trip to Yellowstone. We have small children and were trying to figure out the best activities. That particular web site was essential to our having the ability to plan our trip... Dan Arthur
1541	Why is Idaho running this survey?
1554	I was stationed at Great Falls then at Havre at a radar site in 1952. I hunted antelope while stationed there.
1555	I read the rest of my e-mail and found the number.
1566	Montana is Heaven on Earth! We can't wait to come back. If all goes well. we will be moving to your wonderful state in the near future. Your website was most helpful in our vacation planning.
1575	I have been to Montana 4 different times and of all the places I have been. Glacier Natl. Park has to be a "10" on a scale of 10. I have never been anywhere more beautiful and serene.

Additional Comments:

1591	I lived in Montana for 12 years before moving back to Penna 12 years ago. My present husband picked me up out there and didn't have time to see everything there is to see so he wants to go back. We're really hoping to make it next year around this time. I have a couple friends there I'd like to see again and would like to meet the new friend I've made here on the Internet. Wish we could have made it sooner than this. but with the kids and all the expenses we just couldn't. Now the kids are grown and we're saving for next year.
1657	Since my military service. I have maintained my waterworks operators license for Montana. My desire is to get out on vacation with my wife and look at the state as a possible retirement state. I would like to remain active in waterworks at perhaps a small system.
1683	I really like Montana and I want to move there someday.
1701	I would like to receive a book about traveling in MT. We are planning a trip to Glacier NP maybe next year and would like all info available. Thanks
1740	If I could move to Montana. I would!!!! Taking care of elderly parents prevents that action.
1754	My husband and I are planning on being in Montana in June/July 98 with our Airstream in campgrounds/RV parks. Want to see Yellowstone/Indian artifacts/Lewis & Clark trail anything of scenic beauty and history related. Please send us any information you have related to Montana. Looking forward to our trip. Will retire in May 98. last trip short want to spend at least a month there this time. Our last trip was to Rapid City. SD with a short trip to Montana. Help us plan with any information available. Thanks
1830	The survey worked in early AM a lot faster and better than in the evening. last night it took 3 minutes to get the screen to enter all the information you gave me on the phone. You might want to mention that one to whom ever you request for a survey.
1851	We stayed in the most delightful and hospitable Bed and Breakfast in Rona. called the "Timbers" It was our first B&B experience ever and was very nice. Great hospitality and service at a very good price. We will definitely recommend a stay in Montana to our friends and family members.
1866	We are planning a trip in October 1997. Am interesting in obtaining information about the weather/road conditions.
1867	Butte and Missoula are two truly special cities. Montana has extremely friendly people. It's a wonderful state to visit. I cannot say enough good about the state. I wish it wasn't so far from Texas.
1912	This site was EXTREMELY difficult to get into. I had to make NUMEROUS attempts to get all the way to the survey.

Additional Comments:

2020	First time in Montana last summer. We enjoyed it. We now know why you call it Big Sky Country.
2028	While the additional information requested and received did not influence our decision to visit Montana. it certainly added to our vacation by giving us information on activities that we probably would not have otherwise participated in. (i.e.; white-water rafting. ATV rentals)
2031	We loved our visit to Clark Canyon Res. Loved the camping in the BLM areas. We would be willing to pay a reasonable amount (\$5-10 per day) to insure these areas would always be available.
2038	Montana is a beautiful state and I would (and have) recommended it to friends. NO PROBLEM WITH UNLIMITED SPEED LIMITS!
2040	Please disregard my answer to question 7; I marked that in error and it should be a blank. Additionally. I used to live in Montana and dearly love the state. Part of my reason for examining the Travel Montana website was simple homesickness.
2058	We have lots of family scattered from Hamilton to Colstrip. Love to come to MT. Stays vary in length from a weekend to a week.
2068	I wish I could afford to live in Montana -- but not adequate employment opportunities for someone with my skills and abilities
2091	Found many sight seeing. monuments. etc. were not open until memorial day. Missed many things because we were there in May. Material I asked to have sent came long after we were home again.
2133	we only had 10 days to travel and although we planed to visit central WY and then go north into MT it was flooding in southern MT at the time so we went South toward Casper and followed the OR trail sites back toward the Midwest.
2149	Good thing you sent reminder I didn't have your full e-mail address.
2154	We have friends in Montana and we really like the area. We would like to spend more time visiting your state but we are unable to get away in the summer.
2164	Montana seems like such a wonderful scenic place to visit. Our family loves to take vacations where we can relax. be casual. have a "home base" of a cabin or cottage/condo. and enjoy the scenery. hike. bike. swim. and enjoy each other's company. We are planning a trip west in the next two years. and Montana is definitely a place we would love to visit (including Yellowstone NP).
2167	in the past we have always driven. because air fare is always so hi. Have considered flying but five tickets is very costly.

Additional Comments:

2168	I really look forward to traveling to Montana sometime soon. Would love to visit in late summer or fall but my husbands work doesn't allow for vacations at that time. What kind of activities do you have in the winter time? My Husband is very interested in the Lewis & Clark expedition and has read several books about it. Thanks for the website; at least I can visit it. even if I can't get to Montana soon.
2193	Montana is my favorite state in the USA. It has the friendliest people. the best fishing access. diverse scenery. etc. Traveling to Montana makes you forget about the fast paced life. People often wonder how you can handle to be 30 minutes to the next town to get groceries or about an hour to go to the bigger cities. But you adjust and I find it actually a relief. I am able to come back home to Wisconsin and drive thirty minutes to visit someone and not feel like I have to stay all day because of the drive. Montana has been a part of my entire life and I would really love to move there. But I am not ready to do so yet. I was there in May this year and I miss it already.

APPENDIX B – RECRUIT AND RESPONSE OUTCOME SUMMARY

The data described in this report were from 307 qualified surveys collected from the Clearwater Research Survey Web site from September 9 through October 2, 1997. Potential respondents were recruited by phone from the Clearwater Research Phone Center from September 9 through 18 – weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all respondent's local time). A total of 1,883 dialings were made to recruit 704 potential respondents.

A total of 380 interviews were collected on the Clearwater Research Survey site. The responses were reviewed and matched with the recruiting data to insure that the recruited respondent was the survey respondent. Blank and duplicate responses were deleted.

The following tables show the final dispositions for the phone recruit, and the review process for the completed Internet surveys. The refusal rate was unexpectedly high, as was the non-completion of surveys. Despite an e-mail reminder, less than half of those recruited completed the survey.

Call Outcomes	Number of Dialings	Percent of Sub-Category	PERCENT OF ALL DIALINGS
TOTAL DIALINGS	1,883		
CONTACT	1,144		60.8%
Not complete:			
Initial Refusal	325	28.4%	17.3%
Did Not Qualify *	113	9.9%	6.0%
Mid-Termination	2	0.2%	0.1%
Completed interview	704	61.5%	37.4%
Number of calls resulting in a scheduled call back	153		8.1%
NO CONTACT	586		31.1%
No answer / busy	165	28.2%	8.8%
Answering Machine	325	55.5%	17.3%
Disconnected / Non working number	96	16.4%	5.1%

* reason for disqualification include those who no longer have Internet access, were not available during the survey period, or did not meet the age requirements.

SURVEY OUTCOMES	Less:	TOTAL	Percent
Responded to Internet Survey		380	380
Blank respondent numbers	25		
Non-matching respondent numbers/age	20		
Potential respondents		335	335
Blank responses	24		
Duplicate responses	4		
Qualified respondents		307	307

Recruited: 704 potential respondents

Percent of qualified respondents to recruits: 43.6%

Desired: 66%

APPENDIX C – QUESTIONNAIRE

Travel Survey
Clearwater Research
2136 North Cole Road, Boise, ID 83704
1-800-727-5016, extension 195

Enter Your Personal Response Number in the box below

Don't press the ENTER button! Just scroll down and begin the survey

1. This on-line survey is in response to your accessing the Travel Montana Web site for information about traveling to Montana.
2. What source prompted you to browse the Travel Montana Web site? In other words: How did you obtain the Internet address?
 - ☐ MAGAZINE ADVERTISEMENT
 - ☐ TELEVISION ADVERTISEMENT
 - ☐ INTERNET ADVERTISEMENT
 - ☐ ADDRESS WAS LISTED IN TOURBOOK / ATLAS
 - ☐ MAGAZINE OR NEWSPAPER ARTICLE
 - ☐ FRIEND OR RELATIVE SUGGESTED
 - ☐ WEB BROWSER
 - ☐ LINK FROM OTHER INTERNET SITE
 - ☐ DON'T KNOW / CAN'T REMEMBER
 - ☐ OTHER (SPECIFY in Box)
3. Did you request additional information about traveling to Montana, either by mail or by calling an 800 phone number, or did you just browse through the Travel Montana Web site?
 - ☐ Requested additional info by phone
 - ☐ Requested additional info by mail
 - ☐ Just the Web site ([Skip to Question 5.](#))
 - ☐ I don't remember ([Skip to Question 5.](#))

4. If you requested additional Montana Tourism information by mail or by phone, did you receive the information you requested?

- ☐ Yes
- ☐ No
- ☐ I don't remember
- ☐ I did not request additional information

5. During the past year, did you take any trips outside of your home state of 200 miles or more? [\(Answer Required!\)](#)

- ☐ Yes [\(Skip to Question 6.\)](#)
- ☐ No [\(Skip to Question 24.\)](#)

6. Did you travel to or through Montana? [\(Answer Required!\)](#)

- ☐ Yes [\(Skip to Question 7.\)](#)
- ☐ No [\(Skip to Question 24.\)](#)

7. Was Montana your PRIMARY vacation destination?

- ☐ Yes
- ☐ No

8. Did you decide to travel to Montana before or after you visited their Web site?

- ☐ Before
- ☐ After
- ☐ I don't remember

9. Did you decide to travel to Montana before or after you REQUESTED additional travel information (by mail or phone)?

- ☐ Before
- ☐ After
- ☐ I don't remember
- ☐ Did not request additional information

10. Did you decide to travel to Montana before or after you RECEIVED any additional travel information you may have requested?

- ☐ Before
- ☐ After
- ☐ I don't remember
- ☐ Did not receive / request any additional information

11. How much or little influence did the information you saw on the Web site have on your decision to travel to Montana? Would you say it had . . . ?

- ☐ A great deal of influence
- ☐ Some influence
- ☐ Very little influence
- ☐ No influence at all

12. How much or little influence did the information you received in the mail have on your decision to travel to Montana? Would you say it had . . . ?

- ☐ A great deal of influence
- ☐ Some influence
- ☐ Very little influence
- ☐ No influence at all
- ☐ Did not request / receive information in the mail

13. Did the travel information influence the planning of the length of your stay for your travel to Montana?

- ☐ Yes -- HAD AN EFFECT, LENGTHENED STAY IN MONTANA
- ☐ Yes -- HAD AN EFFECT, SHORTENED STAY IN MONTANA
- ☐ No -- THERE WAS NO EFFECT

14. The next few questions are about your MOST RECENT trip to Montana... What was the PRIMARY purpose of this trip?

- ☐ RECREATION AND ACTIVITIES
- ☐ SIGHTSEEING
- ☐ RELAXATION AND ESCAPE
- ☐ VISIT HISTORICAL SITES / HISTORY MUSEUM
- ☐ VISIT FRIEND OR RELATIVE
- ☐ BUSINESS, CONFERENCE, OR CONVENTIONS
- ☐ COMBINATION OF BUSINESS AND PLEASURE
- ☐ PERSONAL REASON: FAMILY AFFAIR/ MEDICAL EMERG/REUNION/WEDDING
- ☐ JUST PASSING THROUGH
- ☐ I don't remember
- ☐ OTHER (Specify in Box)

15. In which season did you visit Montana on your most recent trip?

- ☐ WINTER
- ☐ SPRING
- ☐ SUMMER
- ☐ FALL

16. What form of transportation was used to visit Montana?

☐ AIR

☐ DRIVE BY CAR / RV

☐ BUS

☐ TRAIN

☐ OTHER (specify in box)

17. How many adults 18 years of age or older were in your immediate traveling party on your most recent trip? Enter the number:

18. How many children 17 years of age or younger were in your immediate traveling party on your most recent trip? Enter the number:

19. How many nights (OVERNIGHT) did you stay in Montana? Enter the number:

20. What accommodations did you use while visiting Montana on your most recent trip?

☐ HOTEL OR MOTEL

☐ BED AND BREAKFAST

☐ RESORT

☐ RENTAL CONDOMINIUM OR HOME

☐ GUEST RANCH

☐ CAMPGROUND

☐ RV PARK

☐ HOME OF FRIENDS OR RELATIVES

☐ YOUR OWN VACATION OR SECOND HOME

☐ OTHER ACCOMMODATIONS (Specify in Box)

21. While you were in Montana, about how much, on average, did you and your immediate traveling party spend per day. Please include lodging, food, purchases in stores, entertainment, and recreation. But, DO NOT include costs of traveling to Montana. ENTER AMOUNT SPENT EACH DAY:

22. Overall, how satisfied were you with your trip to Montana? Would you say you were . . . ?

- ☐ Very satisfied
- ☐ Somewhat satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Very dissatisfied

23. How likely would you be to take another trip to Montana? Would you say you would be . . . ?

- ☐ Very likely ([Skip to Question 25.](#))
- ☐ Somewhat likely ([Skip to Question 25.](#))
- ☐ Neither likely nor unlikely ([Skip to Question 25.](#))
- ☐ Somewhat unlikely ([Skip to Question 25.](#))
- ☐ Very unlikely ([Skip to Question 25.](#))

**NOTE: If you DID travel to Montana, please skip over the next question
and begin again with Question 25**

24. Why did you choose not to visit Montana during the last year? Review all the possible answers below, then, please select UP TO FIVE of the most appropriate answers.

- ☐ AIRLINE COSTS TOO EXPENSIVE
- ☐ COULD NOT AFFORD A TRIP / OTHER FINANCIAL REASON
- ☐ DID NOT RECEIVE INFORMATION ABOUT MONTANA
- ☐ NO TIME FOR A TRIP
- ☐ PERSONAL OR FAMILY ILLNESS / PROBLEM
- ☐ MONTANA NOT ATTRACTIVE OR INTERESTING
- ☐ VISITED ANOTHER LOCATION INSTEAD OF MONTANA
- ☐ NO REASON
- ☐ OTHER REASON (specify in box)

25. In the next two years would you say you . . .

- ☐ Definitely will visit Montana
- ☐ Probably will visit Montana
- ☐ Probably will not visit Montana
- ☐ Definitely will not visit Montana
- ☐ DON'T KNOW / UNSURE

26. In which season would you return to Montana?

- ☐ WINTER
- ☐ SPRING
- ☐ SUMMER
- ☐ FALL

27. In the past five years, how many times have you been to Montana? Enter the number:

28. When you think of a Montana vacation, what thoughts come to mind? Review all the possible answers below, then, please select UP TO FIVE of the answers.

- ☐ Camping / RVing
- ☐ Hiking or Walking
- ☐ Fishing
- ☐ Hunting
- ☐ Mountains
- ☐ Rivers and lakes
- ☐ Water-based activities
- ☐ Special Events
- ☐ Biking
- ☐ Photography
- ☐ Snowmobiling
- ☐ Family and friends
- ☐ Gambling
- ☐ Recreational pursuits in general
- ☐ Visiting historical sites / history / museums
- ☐ Natural beauty / scenery
- ☐ Visit Natural Sites, Parks
- ☐ Openness / Open spaces
- ☐ Wildlife
- ☐ Calmness / relaxing / less traffic and/or stress
- ☐ Fresh Air, freshness
- ☐ Sense of Adventure
- ☐ Skiing or Snowboarding
- ☐ OTHER (Specify in Box)

29. When you take a vacation out-of-state, is your primary purpose to participate in an active outdoor vacation? Examples of outdoor vacations would include, but are not limited to, hiking, fishing, rafting, biking, backpacking, horseback riding or horsepacking, golfing, skiing, snowmobiling, hunting, or any other recreational activities... [\(Answer Required!\)](#)

☐ YES -- purpose is to participate in an active outdoor vacation
[\(Skip to Question 31.\)](#)

☐ NO -- primary purpose is something else [\(Skip to Question 30.\)](#)

30. When you take a vacation out-of-state, is your primary purpose to participate in sightseeing, including driving through scenery, hiking, visiting national parks and historic sites, and seeing other attractions?

☐ YES -- primary purpose is to participate in sightseeing

☐ NO -- primary purpose is something else

31. What kind of vacation best describes the experience you are looking for -- would you say you were looking for a vacation that provides you with relaxation and adventure in a natural setting, or a vacation that provides you with relaxation and a variety of activities?

☐ RELAXATION and ADVENTURE / NATURAL SETTING

☐ RELAXATION and VARIETY OF ACTIVITIES

32. Montana has the largest number of identified Lewis & Clark historic sites in the nation. How interested would you be in a vacation that followed the Lewis & Clark Trail? Would you say you . . . ?

☐ Definitely would be interested

☐ Probably would be interested

☐ Probably would not be interested

☐ Definitely would not be interested

☐ DON'T KNOW / UNSURE

33. Finally, just a few questions for categorical purposes. Are you a man or a woman?

☐ Male

☐ Female

34. How many children do you have living at home? Enter the number:

35. What is your age? Enter the number:

36. What is the highest level of education you have completed?

☐ LESS THAN HIGH SCHOOL

☐ HIGH SCHOOL

☐ SOME COLLEGE / TECHNICAL SCHOOL

☐ COLLEGE GRADUATE

☐ GRADUATE SCHOOLING or DEGREE

37. And finally -- which range comes closest to your total annual household income. . .

☐ under \$20,000

☐ \$20,000 to \$39,999

☐ \$40,000 to \$59,999

☐ \$60,000 to \$79,999

☐ \$80,000 to \$99,999

☐ \$100,000 to \$120,000

☐ More than \$120,000

38. THANK YOU! You have completed the travel survey -- please check your answers, and press the SUBMIT button.

Additional Comments:

Submit Information

--- OR ---

Reset All Answers

Return to the [Welcome Page](#), without submitting a survey.

Thank you for your participation!
